

Solicitation Number: (05-0003-03)

**Conference/Event Support Services for the Office of Naval Research
(Code 04 - Office of Corporate Logistics)**

The statement of work, order information, proposal submission requirements, and evaluation information are set forth below. Proposals from holders of ONR Multiple Award Contracts (MATOC) for support services under CLIN 0003 – Conference/Event Support Services are due by 2:00 PM (local), Thursday, 31 March 2005.

1.0 Background

The Office of Corporate Logistics (ONR 04) is responsible for planning, coordinating, and developing a strategy that accommodates and leverages the commonality of conferences and events associated with the Science and Technology/Research and development (S&T/R&D) programs. This support is essential in order for Code 04 to fulfill its mission areas related to conference and event execution, database development, and event policies and procedures. This effort is key to ensuring the development and optimization of the execution plan for coherency, synergy, and relevancy.

2.0 Statement of Work

2.1 Objective

The focus of this effort is to fill the position of Conference/Event Planner. This position is to assist the Director, Office of Conference and Events in arranging, contracting, executing, and maintaining knowledge databases for the myriad of conferences, industry days, meetings, offsites, program reviews and other ONR-sponsored events. This support will make the office more efficient, better coordinated and standardized. Support would include:

- Assisting in site surveys for potential events
- Assisting in the evaluation and selection of hotel facilities
- Managing hotel rooming lists
- Assisting the development and management of conference budgets
- Building databases and forms
- Designing and creating multiple types of event materials including attendee packages, evaluation forms, nametags, etc.
- Assisting with the management of vendors
- Interacting with ONR contracts and legal departments

2.2 Scope

There is a need for support to the Office of Conference and Events. The desired result is to ensure tasks given by the Director are completed accurately and on time; to ensure that deadlines are met and that volume of events continue without interruption.

2.3 Technical Tasks/Requirements

Specific tasks to be accomplished by the contractor include:

- Assisting the Director in the planning, management and execution of conference and events
- Developing and maintaining database of facilities and resources available
- Assisting in maintaining the corporate calendar of all ONR conference and events
- Providing event guidance and assistance to ONR codes
- Assisting in site surveys for potential events
- Assisting in the evaluation and selection of hotel facilities
- Sending out announcements, invitations and other conference advertising that would be transmitted via mail, fax, and emails
- Assisting in the design and production of conference materials (handout materials, papers, speaker bios, etc.)
- Assisting in the management of vendors and rooming lists
- Obtaining quotes for event space and audio visual
- In conjunction with ONR sponsors, creating and helping to compile information for conference notebooks, conference summary reports, proceedings and CDs
- Assisting with agenda structure, room sets and A/V set up
- Maintaining conference archives
- Populating database with ongoing conference and events pertinent to the ONR mission
- Providing on-site support of conference/events as needed
- Attending meetings as necessary
- Preparing reports
- Assisting ONR sponsor with invitational travel as needed
- Performing general administrative duties

2.4 Reports and Other Deliverables: The contractor shall provide the following reports and other deliverables:

REPORT/DELIVERABLE	DUE DATE
Status Report: The contractor shall provide a detailed status report that covers the key activities that took place during that period. Activities will include: work completed, problem area and concerns, work expended and upcoming travel plans. Contractor format is acceptable.	Monthly
Financial Report: The contractor shall provide financial report(s) that include level of effort/hours spent on tasks/projects. Contractor format is acceptable.	Monthly
Event Materials: Presentation material will be developed and submitted to the Program Manager. This will include graphics, reproduction, brochures and all other pertinent material requested.	As required by the Program Manager

3.0 Personnel Requirements

3.1 Personnel Qualifications

The Contractor shall provide qualified personnel to manage and execute all aspects of the statement of work. The following skill sets are anticipated to support the tasks:

3.1.1 Personnel must be thoroughly familiar and proficient in the use of commercial software packages such as Microsoft Word, Excel and PowerPoint.

3.1.2 Conference/Event Planner or Equivalent. The candidate must have at least a Bachelor's degree from an accredited college or university (or equivalent experience) and five (5) years of experience in meeting/event planning. Candidate should have demonstrated competence in all aspects of meeting/event planning. The candidate should have the ability to effectively plan, manage, and execute conferences and events. The candidate should have the ability to effectively communicate both verbally and in writing. It is highly desired that the candidate have earned the Certified Meeting Professional (CMP) designation or at least have seven years of experience in conference/event planning.

3.2 Level of Effort

3.2.1 The level of effort has been estimated for the proposed contract. Both a nine (9) month base period and four (4) twelve month option periods have been defined. The total potential period of performance, including options, is 57 months.

3.2.2 Base Period. The base period of performance will be from the date of Order through nine (9) months thereafter. The level of effort anticipated for this period is approximately .75 man-year at an average rate of 166 hours per month. A summary of the labor categories and the total anticipated annual hours for this effort is provided below.

Labor Category	Hours Per Year
Conference Event/Planner	1,500

NOTE: 2,000 hours is equivalent to one (1) man-year.

3.2.3 Option Periods. The period of performance for each Option Year will be from the date of option exercise through twelve (12) months thereafter. The level of effort anticipated for each option period is approximately one (1) man-year at an average rate of 166 hours per month. A summary of the labor category and the total anticipated annual hours for this effort is provided below.

Labor Category	Hours Per Year
Conference Event/Planner	2,000

NOTE: 2,000 hours is equivalent to one (1) man-year.

3.2.4 The above labor categories and hours are provided as the Government's best estimate of the work to be performed. The offeror may propose the same level of effort (hours and labor categories) or a different level of effort based on its own labor classification system and unique approach to satisfy the Government's requirement. While the Government will consider an alternate level of effort, it is the Government's preference to maximize the estimated labor hours devoted to the direct performance of the technical tasks. To the extent that the level of effort proposed is different than the Government's estimate, the offeror's technical proposal should clearly specify the hours and labor categories proposed for each task in the statement of work.

4.0 Order Details

4.1 Contract Type. The Navy anticipates awarding a cost plus fixed fee level of effort task order.

4.2 Period of Performance. The period of performance for the base period shall be from the date of Order through nine (9) months thereafter. If exercised, the period of performance for each option year shall be from the effective date of option exercise through twelve (12) months thereafter.

4.3 Other Direct Costs (ODCs). ODCs (including travel, supplies, etc.) will be reimbursed at cost plus G&A without profit or fee. Purchases of items (other than consumable materials or supplies) exceeding \$2,500 and all travel must be approved in advance by the Contracting Officer's Representative (COR). The total Travel/ODC amount is not to exceed (NTE) \$5,000.00 per year, including G&A.

4.3.1 Travel and Per Diem. Travel will be required to support this Statement of Work. In accordance with the contract requirements, direct costs associated with the Contractor's travel, including per diem, shall not exceed the applicable rates found in the Joint Travel Regulations (JTR). All travel arrangements under the Contractor's responsibility include: clearance requests, hotel accommodations, travel orders, and visa/passport requirements, unless otherwise stated by the Government sponsor. The Government estimate for travel and per diem is \$5,000.00 per year, including G&A.

4.3.2 Other Direct Costs (Other than Travel and Per Diem). There are no ODC's required for this effort except travel and per diem.

4.4 Place of Performance. Work will normally be performed at the Office of Naval Research.

4.5 Government Furnished Resources (GFR). The Government will provide information, material and forms unique to the Government for supporting the task. The Government furnished resources necessary to perform the statement of work should be identified and requested through the designated Contracting Officer's Representative (COR).

4.5.1 Facilities, Supplies and Services. Basic facilities such as work space and its associated operating requirements (i.e., phones, desks, and utilities) will be provided while working in Government facilities. The availability of any required computer resources while working in Government facilities should be verified in advance with the designated Contracting Officer's Representative (COR).

4.5.2 Information. All Government unique information related to this requirement necessary for Contractor performance will be made available to the Contractor. The Contracting Officer's Representative (COR) will be the point of contact for identification of any required information to be supplied by the Government.

4.5.3 Documentation. All existing documentation relevant to this task's accomplishment will be made available to the Contractor at the beginning of the task. The Contractor will be required to prepare documentation in accordance with defined guidelines provided by the Government.

4.5.4 Equipment. With the exception to the basic facility items noted Subsection 4.5.1, and in accordance with the general guidance in FAR Part 45.102, Contractors are required to furnish all property necessary to perform on Government contracts or orders. PC's should not be proposed as a direct charge under this solicitation. For security purposes, computers may be required to be authorized and approved for use by ONR.

Contractors may be required to obtain one or more Navy Marine Corps Intranet (NMCI) seats to perform the Task Order statement of work. ONR currently plans to formally transition to NMCI on or about 1 OCT 2005. During the performance

of the Order, if either party (Government or Contractor) identifies a requirement for the Contractor to obtain an NMCI seat to perform its duties, ONR officials will work with the Contractor to obtain an NMCI seat in a timely manner and, if necessary, will pursue a mutually satisfactory agreement in regards to any formal modifications or changes to the scope, structure or dollar values of the Order as a result of the emerging NMCI requirements. General information regarding NMCI can be obtained at: <http://www.nmci-eds.com/index.asp>.

4.6 Subcontracts/Consultants. Contractor may request or propose, on a case-by-case basis, subcontract/consultant support for specific technical tasks.

4.7 Security Requirements.

(a) Clearance Requirements. No classified information or requirements are anticipated. The Contractor is required to safeguard the information labeled as proprietary.

(b) Privacy Act. All Contractor personnel assigned to this task will have access to information that may be subject to the Privacy Act of 1974. The Contractor is required to ensure the proper safeguarding of such information to prevent unauthorized release.

(c) Nondisclosure Agreement: In the course of its work, the Contractor will be required to execute a Nondisclosure Agreement (NDAs) as outlined in Section 5.2.1 of this solicitation.

4.8 Organizational Conflict of Interest

4.8.1 Safeguarding Information:

The parties acknowledge that, during performance of the contract resulting from this Order solicitation, the Contractor may require access to certain proprietary and confidential information (whether in its original or derived form) submitted to or produced by the Government. Such information includes, but is not limited to, business practices, proposals, designs, mission or operation concepts, sketches, management policies, cost and operating expense, technical data and trade secrets, proposed Navy budgetary information, and acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The Contractor shall take appropriate steps not only to safeguard such information, but also to prevent disclosure of such information to any party other than the Government. The Contractor agrees to indoctrinate company personnel who will have access to or custody of the information concerning the nature of the confidential terms under which the Government received such information and shall stress that the information shall not be disclosed to any other party or to Contractor personnel who do not need to know the contents thereof for the performance of the contract. Contractor personnel shall also be informed that they shall not engage in any other action, venture, or employment wherein this information will be used for any purpose by any other party.

4.8.2 Organizational Restrictions

Support contractor's knowledge of competition sensitive information, described in paragraph (a) above, may unfairly affect its competitive position in future ONR research solicitations. The Contractor understands that, during performance of the contract resulting from this Order solicitation and for a period of up to two years after the completion of its performance of the contract, the Contractor, any affiliate of the Contractor, any joint venture involving the Contractor, any entity into or with which the Contractor may merge or affiliate, or any other successor or assign of the

Contractor may not be eligible to participate as a prime Contractor, subcontractor, consultant, joint venture, partner, or other agreements directly impacted by the this effort.

5.0 Proposal Requirements

5.1 Proposal Format. The Offeror's proposal must be divided into two sections: (1) Technical Proposal, and (2) Cost Proposal. Information for the technical portion shall be in a separate and segregable document from the cost proposal. No cost information shall be in the technical portion. The length of the technical proposal shall not exceed ten (10) pages, exclusive of resumes. There are no page limits on the number of resumes or the pages of the cost proposal. The proposal should be written and organized to be compatible with the Statement of Work, company's organization and accounting structure, and proposed cost.

5.1.1 Technical Proposal

The technical proposal should include the following: The offeror's understanding of and approach to the requirement, resumes of proposed personnel, and the amount of proposed hours for personnel. The Offeror should describe specifically how the work activities required to complete the tasks in the statement of work will be done. The Offeror should explain how technical objectives, tasks and deadlines will be determined; how staff responsibilities will be assigned; whether and to what degree consultants and/or subcontractors will be utilized; how the quality and timeliness of work performance will be supervised and controlled; how the Offeror will coordinate with the program office; how a surge capacity will be maintained to meet unanticipated requirements; and how administrative tasks such as travel, security and resource requests will be handled.

The Offeror should include information relative to previous efforts for the same or similar services provided in the past to include contract numbers and Government points of contact where applicable.

The Offeror should explain what corporate facilities are available and would be used in support of the work including computer resources, publication/media materials and equipment where appropriate. The proposal should acknowledge that the Contractor will provide the appropriate IT/telecommunications equipment for the proposed personnel for this task order.

5.1.2 Cost Proposal

The Offeror should submit a cost proposal that itemizes the following proposed costs (as applicable) for the base and each option period: direct labor (including each labor category with associated proposed hours and hourly rate), fringe benefits. Labor overhead, consultants, subcontracts, subcontractor/consultant handling charges, G&A, cost of money, fixed fee and any other relevant cost categories. The offer should also include the estimated travel and ODC amounts set forth in the "Other Direct Costs" section of the Solicitation as part of its proposed costs. The base calculation and rates must be provided for all indirect cost items. Subcontract cost information containing the same type of details described above for the prime must be provided either with the proposal (it can be submitted in a sealed envelope) or mailed separately before the solicitation due date and time.

If available and applicable, the contractor should also provide its Defense Contract Audit Agency (DCAA) point of contact, including the Branch Office name, auditor name, phone number, and e-mail address.

5.2 Other Required Documents. Offerors should be aware that, upon receiving an award, the following additional documentation will be required:

5.2.1 Non-Disclosure Agreement. Each employee of the successful Offeror will be required to sign a Non-Disclosure Agreement (NDA) prior to commencing work under this Order. The supervisor/manager of the proposed personnel will also be required to sign the NDA on behalf of the Contractor. Attachment A is the NDA that shall be used at the commencement of this order.

5.3 Proposal Submission. The due date for receipt of proposals for this solicitation is no later than 2:00 PM (Local Time) on Thursday, 31 March 2005. All forms of proposal submission must include a signed cover sheet. Proposals can be:

(a) Uploaded electronically via the "[Upload Proposals](#)" hyperlink, which is under the hyperlink for this solicitation on ONR's MATOC website (Note: this site restricts the formats of uploaded documents to those in MS Word, MS Excel, or pdf), or

(b) Sent by regular mail (express mail acceptable) or hand delivered. The original and two copies must arrive by the above deadline at the following address:

Office of Naval Research
Attention: T. Cristinzio, Code 0251
800 North Quincy Street, Rm 720
Arlington, VA 22217-5660
Ref: MATOC Solicitation Number 05-0003-03

6.0 Evaluation Information

6.1 Evaluation Criteria. A Task Order will be awarded to the responsible offeror whose offer represents the best value to the Government. In order to determine which offeror represents the best overall value, offers for individual task orders will be evaluated on the following Technical and Price/Cost Factors:

Technical Factors

- (1) Proposed personnel
- (2) Management Plan and Technical Approach
- (3) Past performance on earlier tasks under this and similar contracts
- (4) Corporate Facilities

Price/Cost Factors

- (5) Cost

The Government will make a determination of the overall value of each proposal in terms of its potential to best satisfy the needs of the Government, considering both Technical and Cost Factors.

The Offeror's technical capability (as measured by the Technical Factors) and Cost Factor are equal in importance. In regards to the stated Technical Factors, Technical Factor 1 is of the greatest weight; Technical Factors 2 through 3 are equally weighted. Technical Factor 4 is of less value than all other Technical Factors.

In evaluating past performance on individual orders, the procedural requirements in FAR 42.15 are not mandatory. Past performance will be based on the Government's subjective

evaluation of the Contractor's performance with previous orders, if any, under this contract and similar contracts.

6.2. Award. The Government will award a task order to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, cost and other factors considered. The anticipated award and start date of this Order is on or around Thursday, 14 April 2005.

7.0 Submission of Questions. Any questions regarding this solicitation must be provided in writing to the Point of Contact listed below. Acceptable forms of written question submission include fax and e-mail. Questions submitted less than 72 hours prior to the closing date for proposals may not be answered and the due date for submission of proposals may not be extended.

8.0 Solicitation Amendments. Any amendments to this solicitation will be posted along with the solicitation on the ONR website. It is the Offeror's responsibility to regularly check for any postings of solicitations, amendments, and questions and answers under this or any other MATOC Solicitation.

9.0 Point of Contact. The Point of Contact for this solicitation is Toni Cristinzio and she can be reached by email at toni_cristinzio@onr.navy.mil or by telephone at (703) 696-8448. The secondary point of contact is Ms. Vera M. Carroll and she can be reached by e-mail at carrolv@onr.navy.mil or telephone at (703) 696-2610.

**Non-Disclosure Agreement Regarding Contractor Support
for the Office of Naval Research**

The undersigned individual, _____, agrees, both in his personal capacity and as an employee of _____ as follows:

BACKGROUND

1. The mission of the Office of Naval Research is to plan, foster, and encourage scientific research and technology development in recognition of their paramount importance in the maintenance of future naval power and the preservation of national security. ONR provides for the continuing technological superiority of U.S. naval forces, by providing the Department of the Navy (DoN) with mission-relevant, affordable new capabilities that create and exploit scientific breakthroughs, respond to fleet requirements, and support strategic U.S. industries. ONR requires contractor technical services and research support in order to meet these requirements. The services/support that may be provided to ONR by contractor personnel include but are not limited to the following:
 - i. Assist ONR personnel in overall technical program management support on matters and issues consistent with ONR sponsored development projects, including assisting in the evaluation of white papers, proposals, program/project planning, investment reviews, technology assessments, data analyses, conference and seminar activities, and financial issues.
 - ii. Provide support in the financial execution of ONR programs. Monitor availability and use of funds. Review financial documents and plans for impact on program objectives and requirements. Prepare internal financial notices, instructions, guidelines and reports. Conduct analyses and provide reports that identify, quantify and evaluate financial execution of accounts and accomplishment of program goals and milestones. Coordinate preparation and review of actual and projected funding estimates, justifications and strategies. Identify deficiencies, excesses, trends and imbalances to assure funds availability. Work with program personnel to expedite financial execution and ensure programmatic benchmarks are met.
 - iii. Draft analyses, presentations, notes, assessments, testimonies, speeches, and other materials on various technical/management topics, as requested, for use by ONR personnel with other internal ONR departments and externally with the Navy staff, Department of Defense, other federal and state agencies and the U.S. Congress.
 - iv. Provide assistance in the areas of information technology to include database design and maintenance, software development, graphics and reproduction, and other allowable materials and services.
 - v. Provide administrative and management support in the execution of ONR programs to include the preparation of official documents and files for execution by Government employees.

- vi. Provide support on technical, programmatic and operational matters pertaining to the diverse array of technologies investigated and supported by ONR.
2. The undersigned individual is serving as contractor support for ONR. As such, he has and will continue to come into contact with proprietary technical and commercial information. He likewise will have access to sensitive internal information developed by or on behalf of the Government in connection with the accomplishment of ONR's mission.

AGREEMENT

1. The undersigned individual agrees that he will not disclose to any individual, company, or Government Representative¹ any information² relating to current or proposed Navy budgetary information, acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The undersigned individual agrees that he will promptly notify the ONR Office of Counsel of any attempt by an individual (including any contractor personnel), company or Government Representative to gain unauthorized access to such information, and of any disclosure of such information to unauthorized parties. Such notification shall include the name and organization, if available, of the individual, company or Government Representative seeking access to such information.
2. The undersigned and his employer acknowledge that the owner of any proprietary information improperly disclosed stands as an intended third-party beneficiary of this non-disclosure agreement. In the event of an unauthorized disclosure of proprietary information, the owner of the information may seek legal recovery under this non-disclosure agreement, even though the information owner is not a formal party to the agreement.

FOR THESE REASONS the undersigned individual agrees on his own behalf, and his employer likewise concurs, to protect, respect and not disclose the proprietary information and Government mission- and procurement-sensitive information that may come to their attention as part of the contract assistance provided to ONR.

Employee Signature _____

Printed Name _____

Date _____

Concurrence by the employer:

Supervisor/Manager Signature _____

Printed Name _____

Date _____

¹ Government Representative is defined as any Government employee, either military or civilian, not assigned to the activity or program office for which the effort is being performed.

² This information includes, but is not limited to, contractor proposals, proprietary data and commercial information, reports and other information in the Government's possession, including information contained in contracts/grants/agreements and associated records and files